

**Sam Ip, MBA, MSc(Econ), MCIM, ACIS**  
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## **PROFILE**

A financial and marketing professional with a 15 year track record of success in financial and marketing business decisions and managing the delivery of financial solutions to support strategic business objectives. Recognized for maintaining the highest level of professional standards for the organization and effectively aligning business and financial strategies. Key strengths include managing large corporate and retail clientele for the financial institutions (in banking, insurance and mutual funds filed), communicating effectively with the clientele and business stakeholders, managing and motivating multi-functional teams to achieve desired results.

## **PROFESSIONAL EXPERIENCE**

### **Three Way Electrical Ltd. , Edmonton, Canada** **Project Officer**

**2007 - Present**

- Managed the implementation of a Electrical Cabling Project with the City of Edmonton's both of Dawson Bridge Rehabilitation and Quesnell Bridge Construction Project, and Telecommunication Network Project with PTI's Wapasu Creek Lodge, Fort McMurray, Alberta, with 20 project team members. Exceeded expectations in achieving strategic business, financial and technical objectives for the project.
- Implemented the project management process that significantly improved project discipline and business value within the operations areas.
- Led a multi-disciplinary team of workers and technicians for launch and then test of Electrical Cables to provide an electrical power for running the entire project. Conceptualized, achieved acceptance by senior leaders and implemented a parallel method for multiple project streams that successfully shortened time to market by 60%.

### **Bank of East Asia, Hong Kong** **Manager**

**1995 - 2007**

- Familiar with Corporate Banking market instruments such as Trade Finance products, preparation of credit proposal for approval of around US\$5 million facilities and transactions , after soliciting corporate customers and assessing their credit risks, and furthermore managed the corporate client account by leading a multi-disciplinary team of staff of 20 to implement credit controls and more business generation.
- Familiar with Retail Banking products such as Mortgage, General and Life Insurance, such as Auto, Commercial and Term insurance etc., and Mutual Funds products, provided the retail customers with the advice on them, as long as held the license of financial advisor issued by Hong Kong Monetary Authority and Hong Kong Securities and Future Commission.
- Successfully delivered general insurance house's products (Automobile , Commercial insurance etc.) and life insurance house products via the bank branch network by way of negotiating and

dealing with the insurance houses which are AIA, AVIVA, Zurich, Prudential, China Life, Blue Cross etc., and of effectively communicating with front and back office.

- Led a multi-disciplinary team of 80 branch and business managers to deliver Mutual Funds products by negotiating and dealing with fund houses, such as Fidelity, Franklin Templeton, Schroders, Jardine Fleming, Manulife funds etc. (Note: the leadership reported by Asian Wall Street Journal dated June 21, 2001) with zero impact to the \$100 million of Fund business transaction.
- Implemented critical components of a Mutual Funds marketing system, including Compliance with Hong Kong Monetary Authority and Hong Kong Securities and Future Commission and Financial Reporting.
- Designed and delivered management process and training that significantly improved branch staff's distribution and marketing of both mutual funds and insurance products, that successfully shortened time to market by 60%.

**Belgian Bank, Hong Kong**  
**Manager, Corporate Lending**

**1993 - 1995**

- Delivered Trade Finance products, preparation of credit proposal for approval of around US\$3 million facilities and transactions, after soliciting corporate customers and assessing their credit risks, and furthermore managed the corporate client account by leading a multi-disciplinary team of staff of 10 to implement credit controls and more business generation.

## **EDUCATION**

**Master of Business Administration (M.B.A.)**

**1992**

Birmingham City University, Birmingham, United Kingdom  
Double Major in Marketing and Accounting/Finance

**Master of Science in Financial Economics (MSc.(Econ))**

**2002**

University of London, London, United Kingdom

**Chartered Marketer, Member (MCIM)**

**2007**

Chartered Institute of Marketing, United Kingdom

**Chartered Secretary (ACIS)**

**2008**

Institute of Chartered Secretaries and Administrators, United Kingdom

Presently Pursuing the Examination of the **Certified Management Accountants** (CMA Canada)

## **REFERENCE**

Reference Upon Request

